



## CONSULTANT FINANCIAL SCREENING CONTRACT / MODIFICATION REQUEST FORM

Rev. 8/23/04

DATE:

TO: Raeleen Maxfield, Consultant Services Accountant, [rmaxfield@utah.gov](mailto:rmaxfield@utah.gov); and,  
<Insert Consultant Services Contract Specialist Name & Email>

FROM:

### PROJECT MANAGER SECTION

PIN No.:	Job/Proj (CID No.):	Est. \$ Amt. (Pool):
Project No.:	Contract No.:	Mod. No.:
Project Description:		

Fee Type:	Unit Price	Lump Sum	Cost Plus Fixed Fee		
Consultant Selection Type:	Pool	Standard RFQ	Streamlined RFQ	Engineer of Record	Sole Source
Pool - Period:	2003-2005	2001-2003	1999-2001	Other (Specify):	
Pool - General Engineering Discipline:				Other (Specify):	
RFQ – Proposed Selection Team:					

Consultant:	Local Government Entity:
Project Contact Name:	Project Contact Name:
Contact Title:	Contact Title:
E-Mail Address:	E-Mail Address:
Phone No.:	Phone No.:

### FINANCIAL SCREENING SECTION

Approved Total Overhead Rate:	Pool Dollars Available (if applicable):
Fringe Benefits Overhead Rate:	Financial Screening Expiration Date:
G & A Overhead Rate:	Federal Tax ID Number:
Eligible For Projects Over \$250,000:	Fixed Fee Rate:
Comments:	
Boiler Plate Change Required :	

### REQUEST FORM INSTRUCTIONS

1) Project Manager initiates form completing as much information in the top section as possible regarding the Consultant they would like to select for the project, 2) Project Manager then e-mails form to Jeff Tingey (Accountant) and Contract Specialist and waits for Financial Screening Verification from Accountant before contacting the Consultant, 3) CS Accountant then Approves or Disapproves Selected Consultant by completing the FS Section of this Form and e-mails it back to the Project Manager, 4) Project Manager begins preparing the items listed below, if applicable, and sends them to the Consultant Services Manager with this completed form.

- Scope of Work
- Independent Cost Estimate (ICE)
- ePM 505 Funding Screen Print Out
- R-709 Form (Federal & State Projects)
- Cooperative Agreement (If Applicable)